



# State of Indiana Introduction and Navigation Guide to HRMS 8.81



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## Module 1: Introduction

Applications submitted by candidates seeking employment with the State of Indiana are entered into PeopleSoft. Each applicant receives an Applicant ID to track applications submitted to each state agency. Upon hire, New Employees are assigned a special identifier within the PeopleSoft HRMS application known as Employee ID (EmplID). EmplID is used in the HRMS application to identify, track, and monitor all employee transactions. The EmplID is used in all HRMS processes and reports. Agencies provide pertinent job data using a Personal Payroll Action Form (PPAF) and the employee completes their section of the form providing relevant personal information. This data is entered into the HRMS application. Following the nightly batch cycle a benefit record is opened allowing the employee to enroll in the State of Indiana's Benefit Programs. All HRMS processes and event transactions are controlled or triggered by dates. This functionality is known as Effective Dating.

### Effective Dating

The Effective Date indicates when an action or event is in effect or valid. Each employee record(s) is effective dated. PeopleSoft is designed to automatically perform certain functions based on the Effective Date. Effective Dating provides a mechanism for determining if a transaction is current, history, or future. Some pages display the word "Current," "History," or "Future" so you can always tell what type of transaction you are viewing. Every action taken on an employee will have an Effective Date. Because we have been in production for multiple fiscal years there may be more than one record associated with an employee. Future dated actions may be in the system but PeopleSoft does not "act" on that information until the actual day of the Effective Date.

### How Effective Dates Work

You can determine if a transaction is a current, future or history row based on the Effective Date on the transaction and today's date.

**Current** - date closest to but not exceeding today's date.

**Future** - date is greater than today's date

**History** - date is prior to current date effective date.

The first record is "*Current*" until a second record with an effective date greater than or equal to today's date is added. The first record is "*Current*," the second record is "*Future*."

Once the effective date on the second record occurs, the first record becomes "*History*" and the second record becomes "*Current*." If a third record is added and the effective date is greater than today's date it is the "*Future*" record.

### Effective Dating Example:

Name	Action	Effective Date	Row Type
Today's date is 07/30/02			
Edward Hoosier	Hired	April 7, 2001	Current
Today's date is 11/30/03			
Edward Hoosier	Hired	April 7, 2001	History
Edward Hoosier	Reclassified	October 1, 2003	Current
Today's date is 03/01/04			
Edward Hoosier	Hired	April 7, 2001	History
Edward Hoosier	Reclassified	October 1, 2003	Current
Edward Hoosier	Promotion	March 30, 2004	Future

**Note:** It is very important to use the correct date for new hires, rehires, and terminations as these dates impact benefits and compensation.

### Settings and Browser Information



PeopleSoft is best viewed with a screen resolution of 1024X768, however, 800X600 (standard setting) is acceptable.

Resolution	Advantage	Disadvantage
1024X768	Eliminates the need to scroll	Font is noticeably smaller. May be difficult to read
800X600	Larger font	Scroll bars must be utilized to view the entire page



### Procedure

To change the screen resolution:

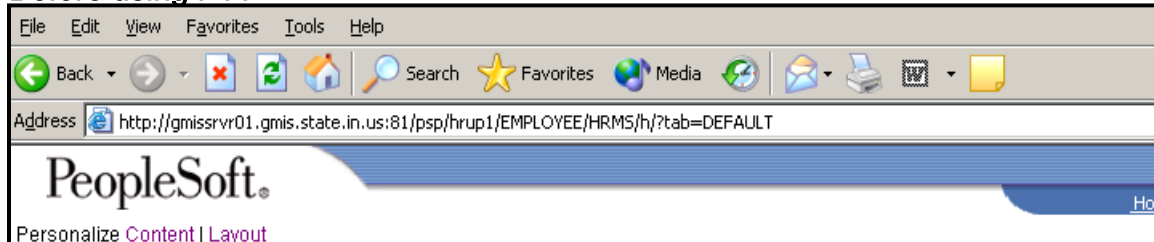
1	Left-click on the <b>Start</b> button 
2	Select <b>Settings</b>
3	Select <b>Control Panel</b>
4	Double-click on the <b>Display</b> icon 
5	Left-click the <b>Settings</b> tab
6	Move the arrow to select the desired screen resolution.

## Using the F11 Function

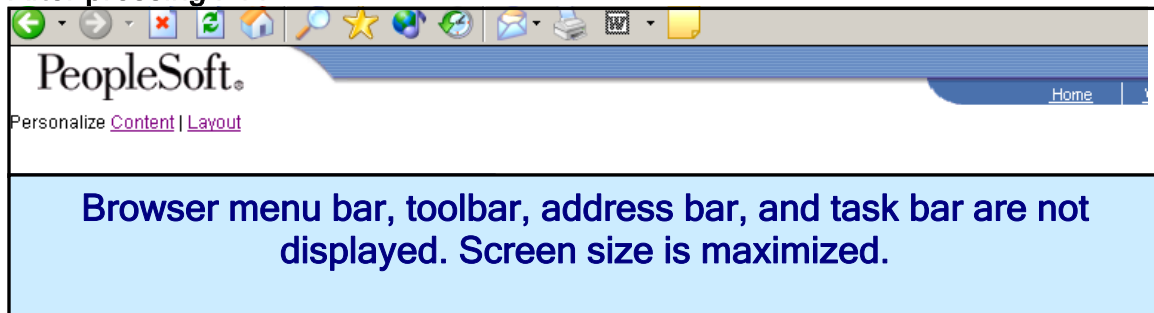
The function key, F11, serves as a toggle switch to turn on and off page layout features for maximizing your screen and eliminating unnecessary tools bars while you are using the PeopleSoft HRMS application.

(\*\* Close Favorites and Search menus on the browser before you use F11.)

### Before using F11



### After pressing F11



F11 also hides the task bar from the bottom of your screen. You must press F11 again to display and access the task bar.

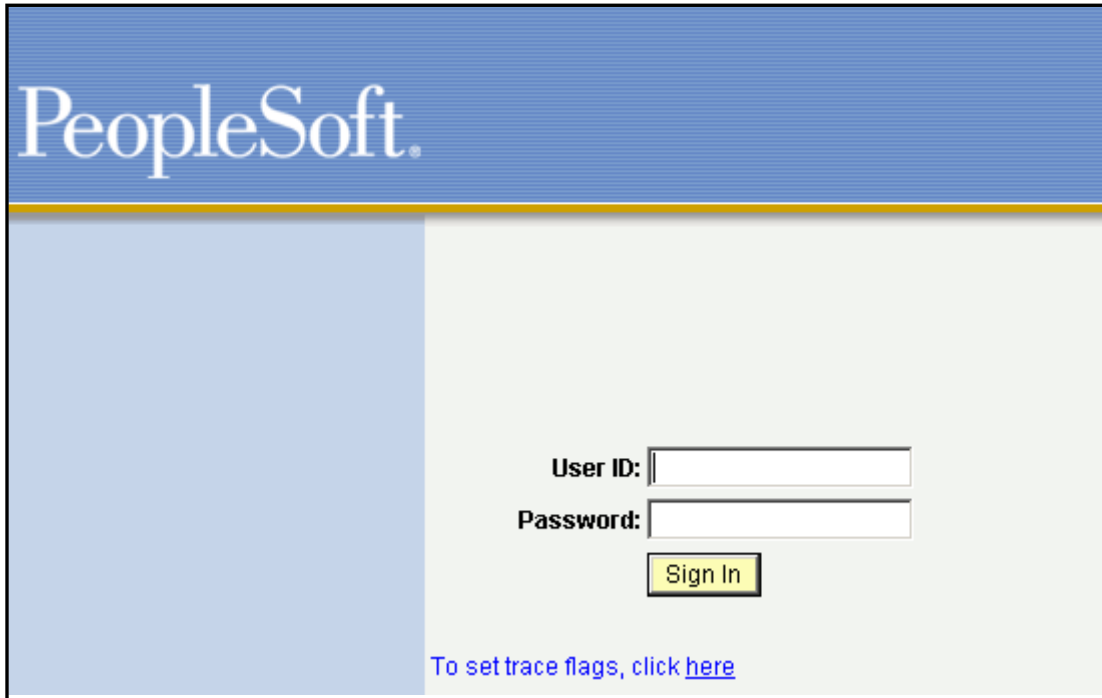
**DO NOT USE THE BROWSER'S BACK BUTTON TO NAVIGATE WITHIN PEOPLESOFT!**

## Module 2: Getting Started

### Logging In

PeopleSoft is accessed through the web. Open Explorer to the State of Indiana Intranet: <http://intranet.state.in.us/base/index.stm> and click on **PeopleSoft Human Resources Login** quick link.

The PeopleSoft Sign in Page displays:

The image shows the PeopleSoft Sign In page. At the top, there is a blue header with the "PeopleSoft." logo in white. Below the header, the page is divided into two main sections. The left section is a light blue vertical bar. The right section is a light gray area containing the login form. The form has two input fields: "User ID:" and "Password:". Below the "Password:" field is a yellow "Sign In" button. At the bottom right of the gray area, there is a blue link that says "To set trace flags, click [here](#)".

**Note: Your User ID and Password is CASE SENSITIVE!**

**User ID's** generally are comprised of the user's first initial and last 6 digits of their Employee ID Number. **Ex: User ID: T207654**

**Passwords** are comprised of the user's first letter of their first name + the last four digits of the user's social security number + the user's first letter of their last name. **Ex: Password: L6547T**

**Change your password when prompted. DO NOT share your password!**

## Changing Your Password

To change your password, click the **Change my password** hyperlink in the menu. Enter your current password in the Current Password field. Enter the new password in the New Password and Confirm Password fields. Note: Passwords must be 6 characters in length with a combination of letters and numbers.



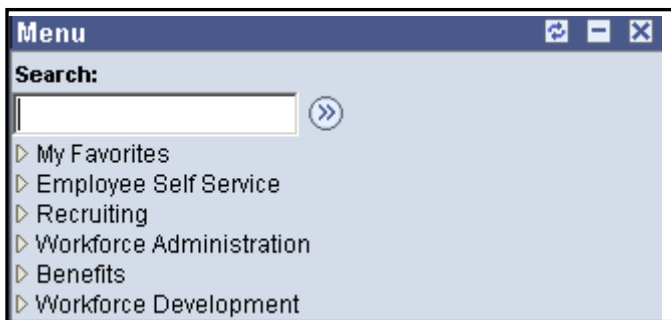
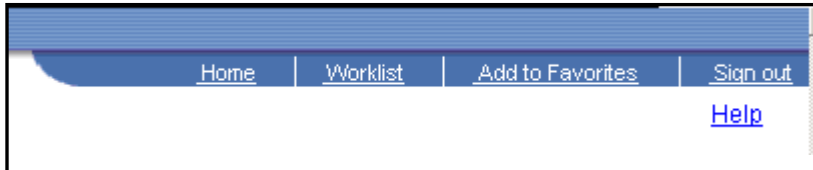
### Procedure

1	Follow the following navigation: Menu>Change my password
2	Enter the current password in the Current Password field.
3	Enter the new password in the New Password field.
4	Enter the new password in the Confirm Password field.
5	Click the <b>Change Password</b> button. <span>Change Password</span>

## Module 3: PeopleSoft Homepage

### Header Menu

The universal navigation header is located at the top of your PeopleSoft page and remains static as you navigate through the pages. The navigation header contains the following links: Home (homepage), Worklist (future use), Add to Favorites, Sign out and Search.



- |                         |   |
|-------------------------|---|
| <b>Home</b>             | Returns you to your homepage, found on the universal navigation header.   |
| <b>Worklist</b>         | Worklists are generated when using a workflow-enabled application. The State of Indiana currently does not utilize workflow, however it may be utilized as a future enhancement.  |
| <b>Add to Favorites</b> | Favorites allow you to create your own list of bookmarks to components and transaction pages. Once you add a favorite, it is maintained under the My Favorites folder in the menu. Expand the My Favorites folder and click the hyperlink you want to view. |
| <b>Sign out</b>         | Select this button to log off from the application and return to the sign on page.<br><b>ALWAYS SIGN OUT!</b>   |
| <b>Search</b>           | A search engine integrated with the PeopleSoft Internet Architecture that allows you to search for any registered content references Tip: This is a good tool to use when trying to find new navigation paths for frequently used modules.                  |

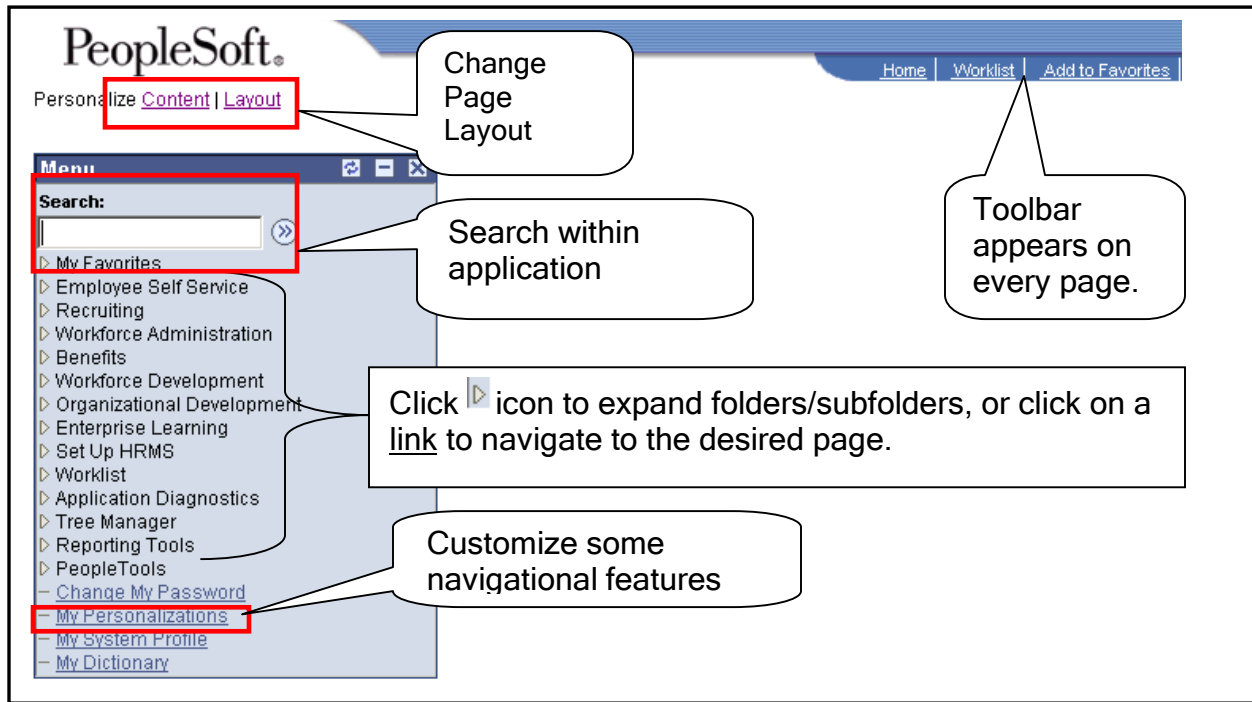
**Use the tabs and links within PeopleSoft HRMS to navigate.**

**DO NOT USE THE BROWSER'S BACK BUTTON TO NAVIGATE WITHIN PEOPLESOFT!**



## PeopleSoft Home Page

The PeopleSoft Home Page always displays the main menu for the application, the header toolbar, and personalization features.



### Customize Page Content and Layout

Click the Content hyperlink (see screen shot above). Checking both Menu and My Reports will display the main menu and any reports scheduled to run. Users who run reports during “off-peak” hours will have easier access to the Report Manager when utilizing this customization. Click the Return to Home hyperlink or the Save button to return to the Home Page.

### Personalize Content

---

**Choose Pagelets:** Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.

**Arrange Pagelets:** Go to [Personalize Layout](#)

**Welcome Message:**

**PeopleSoft Applications**



☒ [Menu](#)

☒ [My Reports](#)

Click the Layout hyperlink. This allows the user to move the position of the My Reports pagelet or additional pagelets on the home page from one, two or three columns. Click the Return to Home hyperlink or the Save button to return to the Home Page.

## Personalize Layout

---

**Basic Layout:** ☒  ☐ 

**2 columns** **3 columns**

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

**Add Pagelets:** Go to [Personalize Content](#)


# = Required - fixed position pagelet  
\* = Required - moveable pagelet

**Left Column:**

Menu  
My Reports


**Right Column:**

--No Pagelets Selected--

Delete Pagelet

---

 Save

[Return to Home](#)

This only changes the display on the Home Page.

## Customize Navigation

Click the My Personalizations hyperlink at the bottom of the menu list.. It is recommended to accept all defaults and customize navigation exclusively.

### Personalizations

Lisa Tabor

Standard settings are in effect.

Changes to Personalization settings require you to log off and log back on in order to take effect.

#### Personalization Categories

##### Description

##### Personalize Option

General Options

Personalize Option

Interntl & Regional Settings

Personalize Option

System & Application Messages

Personalize Option

Navigation Personalizations

Personalize Option

Restore Defaults

Option Category: Navigation Personalizations

#### Personalizations

Find First 1-10 of 10 Last

Personalization Option	Default Value	Override Value	
Automatic menu collapse	No		<a href="#">Explain</a>
Tab over Calendar Button	No		<a href="#">Explain</a>
Tab over Grid Tabs	No		<a href="#">Explain</a>
Tab over Header Icons	No		<a href="#">Explain</a>
Tab over Lookup Button	No		<a href="#">Explain</a>
Tab over Navigation Bar	No		<a href="#">Explain</a>
Tab over Browser Elements	No		<a href="#">Explain</a>
Tab over Page Links	No		<a href="#">Explain</a>
Tab over Related Page Links	No		<a href="#">Explain</a>
Tab over Toolbar	No		<a href="#">Explain</a>

Restore Category Defaults

OK

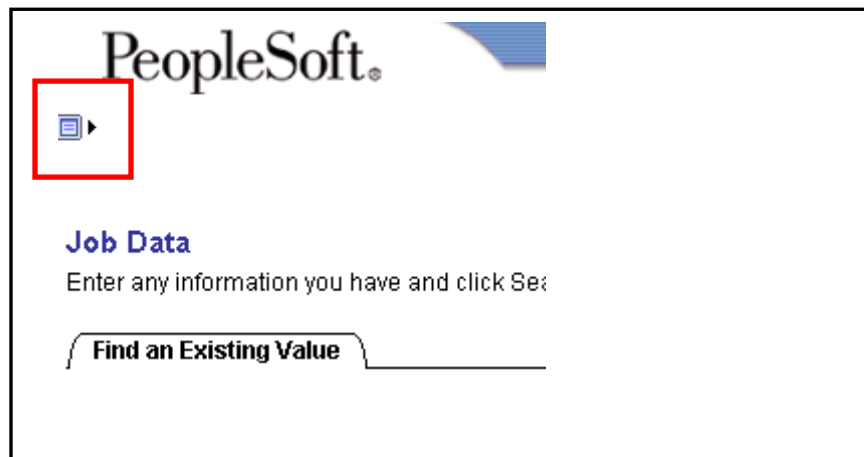
Cancel

“Tab over” means your cursor skips over the icons when you are entering data and using the tab key instead of your mouse to move to the next field. “Automatic Menu Collapse” hides the menu as soon as you navigate to a page.

Instead of using the auto collapse feature you can hide and unhide the menu at any time. Collapse the Menu by clicking on the minimize icon.



Expand the menu by clicking on the expand icon.

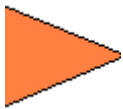


## Module 4: Navigating Through The Menu

### Folders and Navigation Paths

Menu navigation consists of a hierarchy of folders and subfolders. (Similar to other web pages or directories, folders, and files on your desktop.) See Appendix A for a list of 8.0 navigation paths and their 8.81 counterpart.

**Expanding and collapsing folders are the primary means of getting around in your PeopleSoft application.**



This icon indicates a **Folder** containing other sub folders or individual pages. The folder is **closed** (collapsed).



This icon indicates a Folder containing other sub folders or individual pages is **open** (expanded) and contents are displayed.



This icon indicates this is a page link. A page link is the lowest level, the folder is completely expanded, Searches, views, and data entry occur on “pages.”

Click the folder name to **expand** (open) the folder and display the contents.

Click the folder name again to **collapse** (close) the folder and hide the contents.

Example of an expanded folder, subfolder hierarchy:

**Menu: Workforce Administration>Job Information>Job Data**

The screenshot shows a menu with a search bar and a list of items. The 'Workforce Administration' folder is expanded, showing its subfolders: 'Increase Workforce', 'Personal Information', 'Job Information', and 'Job Data'. The 'Job Information' folder is also expanded, showing its subpages: 'Contract Administration', 'Review Job Information', 'Job Data', 'Pay Rate Change', 'Business Expenses', and 'Company Property'. The 'Job Data' page is highlighted and underlined.

Top of the hierarchy, folder is on the far left

Expanded folders change color. Pages, the lowest level in a folder, are highlighted and underlined.

Subfolder is indented.

- Indicates page, lowest level in a folder

## New Window

Often it is necessary to open a new window when searching for information that is not contained on the current page. To navigate to a new page without returning to the menu, open a new window by clicking the **New Window** hyperlink.

[New Window |](#)

**Job Data**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with [ ]

Empl Rcd Nbr: = [ ]

Name: begins with [ ]

Last Name: begins with [ ]

Alternate Character Name: begins with [ ]

Personnel Status: = [ ]

National ID: begins with [ ]

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

PeopleSoft opens a new window with the **same page** displayed. Use the menu to navigate to a new page selection. You can minimize either page to the toolbar at the bottom of your screen, just like any other web page.

PeopleSoft opens a new window with the same location displayed. Navigate to the new page you want to use or view.

You can have multiple pages open at the same time. Each window will highlight where you are on the menu. When finished working in the child window, utilize the X in the upper right hand corner to close the window. **Caution: PeopleSoft will automatically close an inactive window after 20 minutes. The original session could be timed out, losing information entered on the page, and requiring the user to sign-in again.**

## Adding/Deleting Favorites

### Adding Favorites

Click “Add to Favorites” in the universal navigation header in the page that you want to bookmark.

Home | Worklist | **Add to Favorites** | Sign out

**Menu**

- Job Information
  - Contract Administration
  - Temporary Assignments
  - Review Job Information
  - Reports
    - Job Data
    - Assign Additional Job
    - Concurrent Hire USE
    - Current Job**
    - Pay Rate Change
    - Calculate Compensation
    - Employee Request USE
    - Supervisor Request USE
    - 1st Rest Authorization USE
    - 2nd Rest Authorization USE
    - Approve Request USE
    - HR Processing USE
    - Correct Personnel Action USE
    - Cancel Personnel Action

**Current Job**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

EmpID: begins with [ ]  
Empl Rcd Nbr: = [ ]  
Name: begins with [ ]  
Last Name: begins with [ ]  
Alternate Character Name: begins with [ ]  
Personnel Status: = [ ]

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

The Add to Favorites page is displayed.

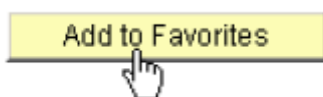
**Add to Favorites**

Please Enter a Unique Description for this Favorite

\*Description: Current Job

Add to Favorites Cancel

Suggestion: Keep the default name. You can add extra descriptive text at the end of the name if you wish. Click “Add to Favorites.”



The favorite is saved and displayed in the **My Favorites** folder .

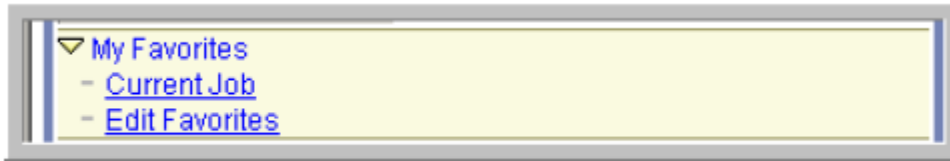
**Menu**

Search: [ ] go

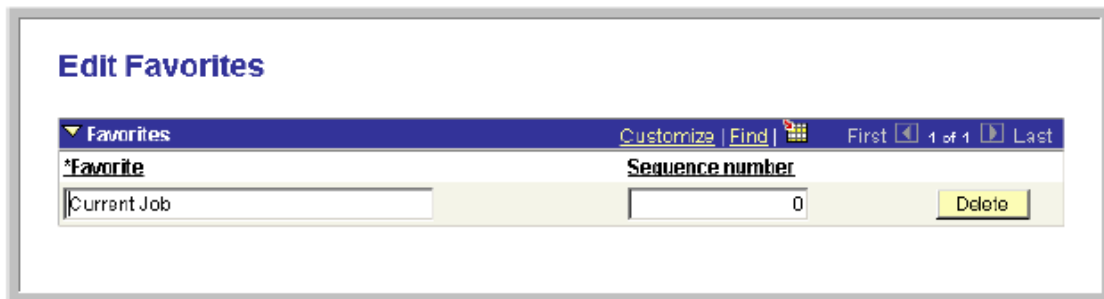
**My Favorites**

- [Current Job](#)
- [Edit Favorites](#)

**Editing/Deleting Favorites** On the Edit Favorites page you can re-label favorites, delete favorites, or modify the sequence in which they appear on your menus. You can also edit saved favorites when a URL is updated or one is deleted. To edit favorites: Expand the My Favorites folder in the left hand navigation.













Click Edit Favorites.



The Edit Favorites page opens displaying a grid with the favorites you have selected and their sequence number. Locate the favorite you wish to modify and make your changes. Click to save your changes.



## Module 5: Using Page Buttons and Links

	Inserts a new row.
	
	Inserts multiple rows. Specify the number of rows (1 to 99 rows).
	Deletes the current row of data.
	
	Displays the next row of data.
	Displays the previous row.
	In a tabbed grid only, expands grid columns to the right so that tabs are no longer needed.
	In a tabbed grid only, the expanded grid is returned to its tabbed state
Customize	Takes you to the customization page for that grid, which enables you to sort by column, reorder columns, hide, and freeze columns.
	Enables you to download the contents of a grid to a Microsoft Excel spreadsheet.
View	Displays the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link morphs to read View 1 so that you can return to the original setting.
Find	Enables you to find a specific row of data.
First	Takes you to the first row of data.
Last	Takes you to the last row of data.

### Keyboard Shortcuts

Hot keys perform immediate actions. When pressed, the designated actions occur. Notice that several hot keys perform different functions depending on the page you are in, such as a transaction page or a search page.

**ALT+1** Saves page in a transaction. Moves to the Search or Add button on a Search or Look Up page. Moves to the OK button on a secondary page.

**ALT+2** Returns to the search page from the transaction page.

**ALT+3** View next row in list when button is active.

**ALT+4** View previous row in list when button is active.

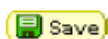
**ALT+5** Opens Look Up page. Opens the calendar prompt.

**ALT+6** Opens the pop-up window on a page.

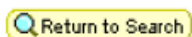
<b>ALT+7</b>	Inserts one or more rows in a grid or scroll area.
<b>ALT+8</b>	Deletes row in a grid or scroll area.
<b>ALT+0</b>	When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
<b>ALT+ .</b>	View next set of rows in grid or scroll area.
<b>ALT+ ,</b>	View previous set of rows in grid or scroll area.
<b>ALT+ /</b>	Finds data in grid or scroll area.
<b>ALT+ ‘</b>	View all rows of data in grid, scroll area, or search page results list.
<b>ALT+ \</b>	Toggles between Add a New Value and Find an Existing Value in a Search page.
<b>CTRL+ J</b>	Displays system information.
<b>CTRL+ K</b>	When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.
<b>CTRL+ Y</b>	Toggles menu between collapse and expand.
<b>CTRL+ TAB</b>	Toggles focus through the frame set.
<b>ENTER</b>	Activates the OK button, where appropriate. On a Search page, activates the Search button. On a Look Up page, activates Look Up button.
<b>ESC</b>	Activates the Cancel button, where appropriate.

### Toolbar Buttons

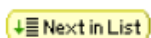
You'll find the toolbar at the bottom of most pages. The toolbar may include search list navigation buttons, page navigation buttons, and page action buttons, but the toolbar changes depending on the type of page that's active or the settings that the developer has set for a particular transaction. So not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for entry.



Sends the information you've entered on the page to the database. You'll generally save when you come to the end of a component. The Save button always updates the data for all pages in a group. When activated, the system displays the "Saved" message in the upper-right corner of the page.













Returns you to the search page.



*Next In List:* Displays the information for the next data row in your search results grid. This button is unavailable if you didn't select the data row from a search results grid, if there

was only one row in the grid, or if the data that appears is the last row in the grid.

-  **Previous in List** Displays the data for the previous data row in your search results grid. This button is unavailable if you didn't select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.
-  **Next tab** Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.
-  **Previous tab** Displays the previous page in the current component. If you're in the first page of the component, this button is unavailable.
-  **Update/Display** Accesses existing rows of data in the database. If data is effective-dated, only current and future rows appear.
-  **Include History** Displays all rows of data: current, future, and history.
-  **Correct History** Accesses existing rows of data in the database and displays all effective-dated rows. Enables you to update all rows, including history rows.
-  **Refresh** Forces a transmission to the application server to validate all data entered on the page.
-  **RelatedLinks** Displays when there are several pages that are related to the current page. Clicking this button opens a new page with a list of related page links.
-  **Notify** Opens the Send Notification page where you can specify names, email addresses, or worklists to send notifications.
-  **Spell Check** Activates spell check for all spell check enabled fields on the page. Each field is checked individually. As each field is checked, processing continues to the next field displaying the spell check page if there are errors. If there are no errors, the "No Errors" message displays.

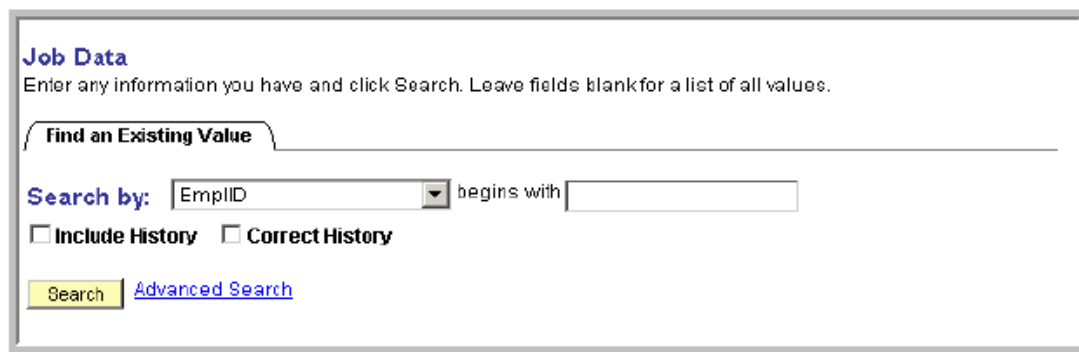
## Module 6: Using Search Pages

### Using the Search Pages

There are two types of searches available, Basic and Advanced. The Basic Search provides only one specific search criteria. The Advanced Search allows you to search using one or more search criteria. PeopleSoft always gives you the option of using Basic or Advanced. PeopleSoft automatically displays the **current** and any **future** rows.

If the type of information you are retrieving is effective dated PeopleSoft gives you the option to choose to include history. When Include History is checked all of the rows matching your search criteria will be displayed. If the Include History is not checked, only the current row that matches your search criteria will be returned. Both Basic and Advanced Search uses Include History as a search option.

### Basic Search



The screenshot shows a web form titled "Job Data". Below the title is a instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." There is a section labeled "Find an Existing Value" with a horizontal line. Below this, the "Search by:" label is followed by a dropdown menu showing "EmplID" and a "begins with" text box. Underneath are two checkboxes: "Include History" and "Correct History". At the bottom left is a yellow "Search" button, and to its right is a blue link labeled "Advanced Search".

Enter your search criteria. Click **Search**. The Basic Search displays the row(s) that match your search criteria and automatically takes you to the page with the selected data displayed.

## Advanced Search

**Job Data**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Empl Rcd Nbr: =


Name: begins with

Last Name: begins with

Alternate Character Name: begins with

Personnel Status: =

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

Use to narrow your search

The Advanced Search provides a variety of search criteria options. This page is especially helpful when you are researching a problem and do not have all of the specific details/codes to perform a basic search.

The Advanced Search allows you to select different operands (directions) for your search criteria. Select an operand from the drop down box to help narrow your search.

begins with
contains
= Equal
not= Not Equal
< Less Than
<= Less Than or Equal To
> Greater Than
>= Greater Than or Equal To
between
in

PeopleSoft provides a variety of operands for you to use to help you include or exclude search criteria.


For example if you knew a job code began with "41" but did not know the exact number you could enter > 4100 to narrow your search.


Use the "Look Up" feature to further refine your selection criteria.


## Search Criteria Look Up Feature

The Advanced Search utilizes the Look Up function for searchable fields that have pre-defined values such as department.

The magnifying glass icon indicates the Look Up feature is available.

**Business Unit:** begins with  

**Department:** begins with  

**Job Code:** begins with  

**Reports To Position Number:** begins with

**Look Up feature available**

## Processing

PeopleSoft may need to read through hundreds of records to find all rows that meet your search criteria. Similar to the hourglass used by many operating systems to indicate a function is being executed; the word “Processing” flashes when PS is performing a function such as “search” to let you know it is working.

## Sorting Search Results

### Search Results

View All First  1-15 of 15  Last

<u>Reason Code</u>	<u>Description</u>
<a href="#">ELC</a>	<a href="#">Elected or Appointed</a>
<a href="#">FIX</a>	<a href="#">MX-Hire</a>
<a href="#">FST</a>	<a href="#">First Job</a>
<a href="#">HAF</a>	<a href="#">Hired from Affiliate</a>
<a href="#">LNP</a>	<a href="#">Loan from Parent Company</a>
<a href="#">NGR</a>	<a href="#">New Graduates</a>
<a href="#">NPS</a>	<a href="#">New Position</a>
<a href="#">PIT</a>	<a href="#">Permanent Int Cpnv Transfer</a>
<a href="#">REH</a>	<a href="#">Rehire</a>
<a href="#">REP</a>	<a href="#">Replace Incumbent</a>
<a href="#">SUB</a>	<a href="#">Substitution</a>
<a href="#">TIC</a>	<a href="#">Temporary Int Cpnv Transfer</a>
<a href="#">TMP</a>	<a href="#">Temporary Assignment</a>
<a href="#">TRN</a>	<a href="#">Trainee</a>
<a href="#">XFR</a>	<a href="#">Transfer</a>

A list of search results can be resorted any time the column name is underlined.

PeopleSoft displays in code number order.

To resort the results in alphabetical order, click on the column name Description.

Click on the appropriate selection. PeopleSoft displays your selection in the search criteria.

## Displaying Search Results

**Job Data**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

EmplID: begins with

Empl Rcd Nbr: =

Name: begins with

Last Name: begins with

Alternate Character Name: begins with

Personnel Status: =

National ID: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#)

**Search Results**  
View All First 1-6 of 6 Last

# of rows returned

EmplID	Empl Rcd Nbr	Name	Last Name	Alternate Character Name	Personnel Status	National ID
<a href="#">10000019497.0</a>		<a href="#">Tabor, Edwin E</a>	<a href="#">TABOR</a>	(blank)	<a href="#">Employee</a>	
<a href="#">10000022891.0</a>		<a href="#">Tabor, Rebecca L</a>	<a href="#">TABOR</a>	(blank)	<a href="#">Employee</a>	
<a href="#">10000025624.0</a>		<a href="#">Tabor, Karen Jean</a>	<a href="#">TABOR</a>	(blank)	<a href="#">Employee</a>	
<a href="#">10000064469.0</a>		<a href="#">Tabor, Tim A</a>	<a href="#">TABOR</a>	(blank)	<a href="#">Employee</a>	
<a href="#">10000207265.0</a>		<a href="#">Tabor, Lisa J</a>	<a href="#">TABOR</a>	(blank)	<a href="#">Employee</a>	
<a href="#">10000221801.0</a>		<a href="#">Tabor, Brian C</a>	<a href="#">TABOR</a>	(blank)	<a href="#">Employee</a>	

The Advanced Search returns multiple records. Click on any value with a hyperlink to select the record you want to view. PeopleSoft always displays the number of rows returned, Use the arrow keys to scroll up and down through the records.

PeopleSoft returns a maximum of 300 records at a time. The View All option can be selected.

**Search Results**  
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.  
[View All](#) First 1-100 of 300 Last

### Include History

When you check PeopleSoft displays the number of history records available at the top of the page. Use the arrow keys to navigate through the history records. The “**Include History**” option is only available on data that have effective dated records. If the “**Include History**” is flagged only the current record is displayed.

## Saving Search Criteria

Searches can be saved by clicking the **Save Search Criteria** link.



### Save Search As

Name the search and then click Save.

**Name of Search:**

The saved search will contain these values:

<b>EmplID:</b>	begins with
<b>Empl Rcd Nbr:</b>	=
<b>Name:</b>	begins with Smith
<b>Last Name:</b>	begins with
<b>Alternate Character Name:</b>	begins with
<b>Personnel Status:</b>	=
<b>National ID:</b>	begins with

[Return to Advanced Search](#)

Enter a name  
for your saved  
search criteria.

Click



### Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Use Saved Search:**

<b>EmplID:</b>	<input type="text" value="begins with"/>	<input type="text"/>
<b>Empl Rcd Nbr:</b>	<input type="text" value="="/>	<input type="text"/>
<b>Name:</b>	<input type="text" value="begins with"/>	<input type="text"/>
<b>Last Name:</b>	<input type="text" value="begins with"/>	<input type="text" value="SMITH"/>
<b>Alternate Character Name:</b>	<input type="text" value="begins with"/>	<input type="text"/>
<b>Personnel Status:</b>	<input type="text" value="="/>	<input type="text"/>
<b>National ID:</b>	<input type="text" value="begins with"/>	<input type="text"/>

☐ Include History   ☐ Correct History   ☐ Case Sensitive

[Basic Search](#)  [Delete Saved Search](#)

Once the search  
criterion is saved,  
PeopleSoft  
displays the  
“Used Saved  
Search” option.

Select a Saved  
Search or enter  
new search  
criteria.

Select “Delete  
Saved Search” to  
delete.



## Module 7: Navigating Within a Page

Most pages are basically the same as the PeopleSoft 8.0 panels. The action buttons are located at the bottom of the page. Record information such as how many history rows have been retrieved are located at the top of the page. PeopleSoft uses many features such as drop down lists, calendars, and lookup to facilitate entering data.

The screenshot shows the 'Work Location' page in HRMS 8.81. At the top, a box labeled 'Tabs on a page' points to the navigation tabs: 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The main form contains fields for 'Employee Status' (Active), 'Effective Date' (07/01/2004), 'Effective Sequence' (0), 'Date Created' (07/22/2004), 'Job Indicator' (Primary Job), 'Action / Reason' (Hire), 'Position Number' (10002796), 'Program Dir E7', 'Position Entry Date' (07/01/2004), 'Regulatory Region' (USA), 'Company' (SOI), 'Business Unit' (00070), 'Department' (045013), 'Location' (0000000971), 'Supervisor ID', 'Reports To' (10002751), 'ID', and 'Establishment ID' (00001). A box labeled 'Insert or Delete Rows' points to the '+ -' buttons at the top right. A box labeled 'Shows if record is current, history or' points to the 'Current' label. A box labeled 'Look up value' points to the magnifying glass icon next to the 'Establishment ID' field. A box labeled 'Action Buttons' points to the 'Save', 'Return to Search', 'Previous tab', 'Next tab', and 'Refresh' buttons at the bottom. A box labeled 'Related Links' points to the 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation' links at the bottom. The bottom of the page also includes 'Update/Display', 'Include History', and 'Correct History' buttons, and a breadcrumb trail: 'Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation'.

**Tabs** - There are three ways to move to another tab within a group:

1. Click on the **Tab Name** at the top of the page.
2. Click on the **Next Tab** action button at the bottom of the page.
3. Click on the tab name link at the bottom of the page.

**Related Links** - You can also navigate to other pages, known as Related Links, using the links at the bottom of the page. For instance, when entering New Hire data you must enter information on several different pages. When you have

completed entering information on the Job Data page you can use the Related Links as a navigational shortcut to the other pages.

## Module 8: Data Entry Features

PeopleSoft provides a variety of data entry aids that facilitate data entry. The most frequently used features are illustrated below.

**Required Fields** - The asterisk symbol (\*) indicates the field is required. PeopleSoft will not let you save data if a required field is left blank. PeopleSoft also edits required fields to ensure that only valid values are entered. Most required fields have either a drop down list of values or a Look Up facility to assist you in choosing valid data.

Example: \*Full/Part Time:


**Record Count** - The record count is a method to quickly identify more than one row within the record for viewing or updating.

**Inserting Rows** - The plus and minus buttons below the record count are used whenever it is appropriate to insert or delete an effective dated row of information. To insert a row click on the "+" icon. PeopleSoft inserts a new row with the effective date defaulted to today's date.

**Deleting Rows** - Delete a row by clicking the "-" icon.

### Using the Calendar Feature

PeopleSoft displays the calendar icon whenever a date field is required.

\*Effective Date:  

Click to open calendar

November 1980

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

◀ Current Date ▶

A calendar icon is always available when you are entering a date. Move to the correct date and highlight. PeopleSoft displays the selected date.

## Using the Look Up Feature



The magnifying glass icon indicates a search box is available to look up the value for this field. A look Up feature is provided when the value is a combination of code/description information stored in separate tables. PeopleSoft uses a drop down box **begins with** for single pre-defined values.

Click on the icon to open. The type of search available depends on the number of valid values for this field. PeopleSoft displays the entire list (View All), or you can enter specific search criteria.

**Look Up Birth State**

Birth Country: USA

State: begins with [ ]

Description: begins with [ ]

Look Up Clear Cancel Basic Lookup

**Search Results**

View All First 1-78 of 78 Last

State	Description
<a href="#">\$E</a>	<a href="#">(blank)</a>
<a href="#">\$U</a>	<a href="#">(blank)</a>
<a href="#">\$UAS</a>	<a href="#">American Samoa Federal</a>
<a href="#">\$UGU</a>	<a href="#">Guam Federal</a>
<a href="#">\$UPR</a>	<a href="#">Puerto Rico Federal</a>
<a href="#">\$UVI</a>	<a href="#">Virgin Islands Federal</a>
<a href="#">AA</a>	<a href="#">Armed Forces Americas</a>
<a href="#">AE</a>	<a href="#">Armed Forces Europe</a>
<a href="#">AK</a>	<a href="#">Alaska</a>
<a href="#">AL</a>	<a href="#">Alabama</a>

**Look Up Birth State**

Birth Country: USA

State: begins with [0]

Description: begins with [ ]

Look Up Clear Cancel Basic Lookup

**Search Results**

View All First 1-3 of 3 Last

State	Description
<a href="#">OH</a>	<a href="#">Ohio</a>
<a href="#">OK</a>	<a href="#">Oklahoma</a>
<a href="#">OR</a>	<a href="#">Oregon</a>

## View All Feature

The "View All" feature is used to see many rows of information, useful when entering multiple rows of data. An example of each and how to initiate the feature follows.

### Using Look Up With the View All Feature

If your Look Up search returns more than 100 rows the View All feature is activated.

The screenshot shows a web form titled "Look Up Country". It has two search criteria: "Country:" with a dropdown set to "begins with" and an empty text box; and "Description:" with a dropdown set to "begins with" and an empty text box. Below these are three buttons: "Look Up", "Clear", and "Cancel", followed by a blue link "Basic Lookup". The "Search Results" section is highlighted with a red box. It contains a blue link "View All", the text "First" with a left arrow, "1-100 of 239", a right arrow, and a blue link "Last". Below this is a table with two columns: "Country" and "Description". The first row shows "ABW" under "Country" and "Aruba" under "Description".

Click on View All then use the scroll bar to move up and down the page to view all of the records instead of using the record count and scroll arrows.

This screenshot is similar to the previous one, but the "View All" link in the "Search Results" section is now "View 100". The record count has changed to "1-239 of 239". A red callout box with the text "Record count changes" points to the updated record count.

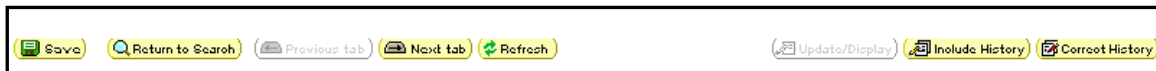
### Using the View All feature When Entering Data

When you are entering/inserting many rows of data it is very useful to be able to see all of the entered rows at a glance rather than scrolling through the records one at a time.

### View History Records Without Rerunning the Search


You may decide you now need to see history records for this transaction. Instead of navigating back to the search panel and flagging “Include History” in the search, you can add history records right from the view or data entry page. The record count will change when including history records.

Click the Include History button at the bottom of the page. This button may be used any time history records are available.



### Saving Data

**Save Your Data**

Always **save** your data! Click  to save. PeopleSoft quickly flashes the word “Saved” in the upper right hand corner of the screen

### Continue Data Entry For Another Employee

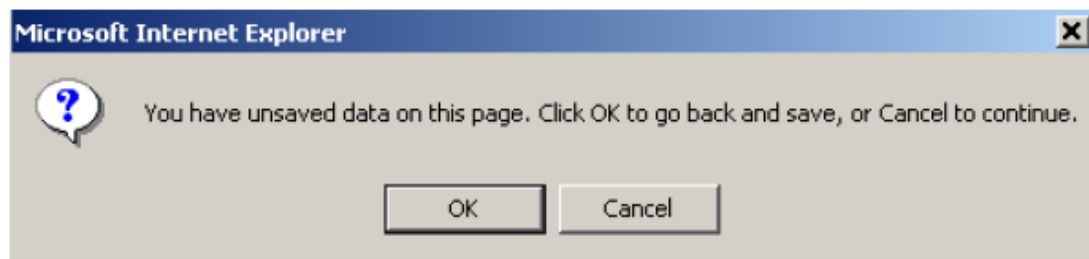
To enter another record on the same page, click the “Return to Search” button . PeopleSoft returns you to the search page. Select another record and continue processing.

### Navigate To Another Page

To move to another page simply go to the menu bar and select the new page or use **My Favorites** to navigate to another page.

### Didn't Want To Save?

PeopleSoft displays a warning message if you attempt to leave a page where you have entered data or made changes without saving.



Click “OK” to return to the page and save your data. Click “Cancel” if you do not want to save the data.